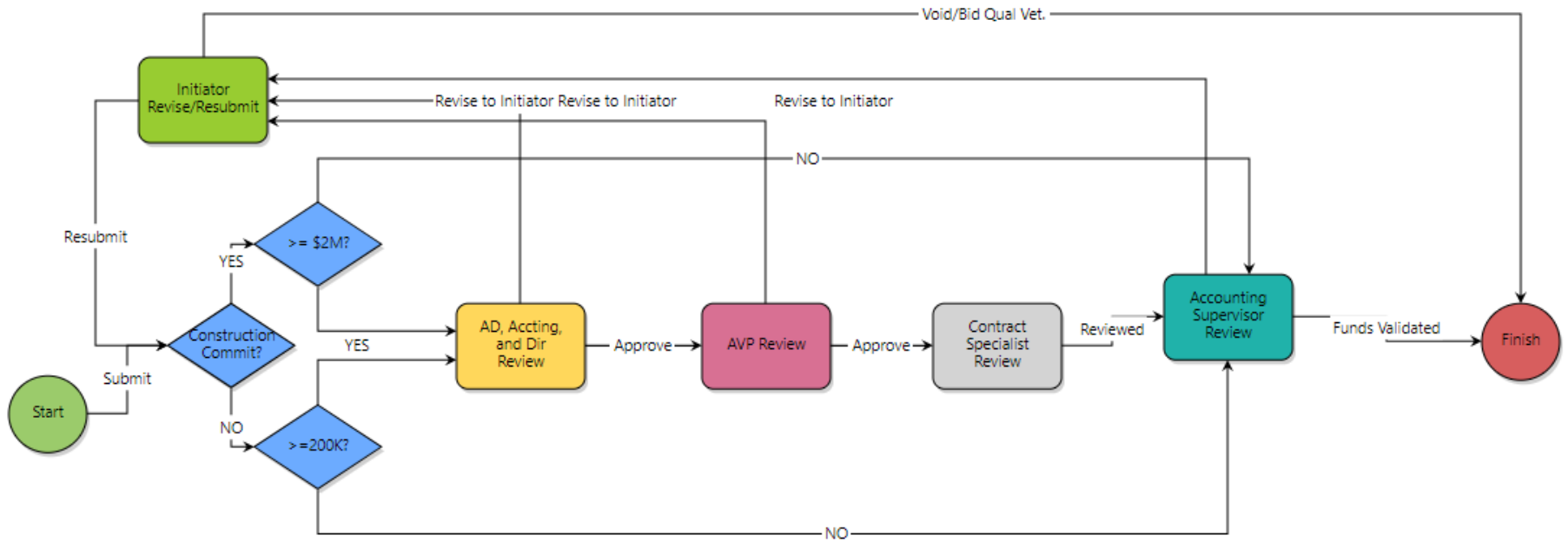




# A Guide On Commitment Approval (CA) Process

*Prepared by e-Builder  
31 January 2018*





## Process Description:

The Commitment Approval (CA) workflow process allows commitments to be reviewed and approved by the appropriate parties, using the structured workflow defined in this document. By moving their existing commitment process into e-Builder, UCF will benefit from more streamlined efficiency, reduce email updates, and provide for greater visibility.

## Process Participants:

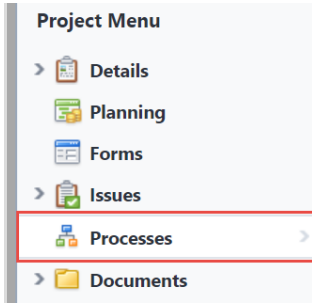
1. Project Manager (PM)
2. Director
3. Associate/Assistant Director
4. AVP
5. Contract Support
6. Accounting Supervisor

## Process Details:

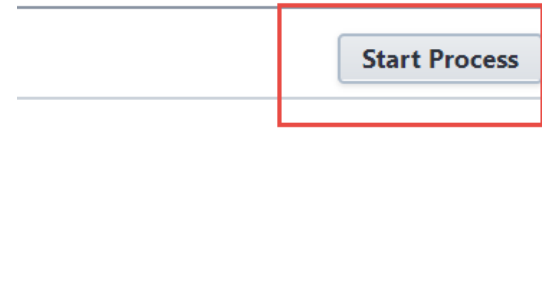
1. After confirming with the client on fees and funds, the Project Manager (PM) will create the commitment and submit it for review.
2. e-Builder validates the Commitment Type and the current contract value. Based on the predetermined conditions the commitment is routed to Director, Accounting Supervisor, Associate/Assistant Director review step or directly to the Accounting Supervisor Review step.
3. Director, Accounting Supervisor, Associate/Assistant Director (AD/Acct/Dir Review) each review the commitment and has to approve to AVP. If one of the reviewers wants to send back to the PM, it will go back to the PM for revisions.
4. The AVP receives the process in their court, reviews the information and can send back to the PM if any updates are required or move the process forward to the Contract Specialist by actioning the process as Approve Commitment.
5. The Contract Specialist receives the process in their court, reviews the information, will use Cobblestone (DocuSign) to get signatures. Once the Contract Specialist uploads the signed contract, and actioned the process as Commitment Ready, the process will route to the Accounting Supervisor for review.
6. The Accounting Supervisor receives the process in their court, checks if the budget is sufficient (increase if necessary), validates the information in PeopleSoft, and can either send back to the PM to revise or move forward by actioning the process as Funds Validated.

## Initiation of Process:

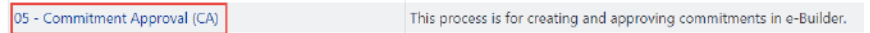
1. Select specific project to start the Commitment Approval Process.
2. Select **Processes** from the Project Menu.



3. Select **Start Process** in the process Module.



4. Click **Commitment Approval** button.



## Project Manager Input:

1. Click process name to open Commitment Approval.

Processes [Reports \(1\)](#)

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status
CA - 7								

Print Log

2. Scroll and complete the necessary details. Required fields will have a red asterisk (\*) and the process cannot be submitted until all required fields have been completed.

Please enter the scope and upload the proposal.

Building Permit Number: \_\_\_\_\_

Date of Proposal:

Project ID: \_\_\_\_\_

Scope of Work:

*Drag and drop file here* or

SFM Permit Number: \_\_\_\_\_

### Add New Commitment Item

Item Number:

Budget Line Item: [Please Select a Line Item](#)

Current Budget: \_\_\_\_\_

Description:

Retainage Percent:

Amount:

Allowance Item?

Custom Fields:

3. Select an action and click **Take Action** button to move process along; possible actions are:

- Submit** – Select this action if all information is entered and process is ready to move forward.

e-Builder

05 - Commitment Approval (CA) [Instructions](#)

Start Process

Entering Commitment Item Instructions:

- Select the Commitment Type
- Select the Company
- Optional: set the Commitment Date, Scope of work, Notice to Proceed Date, and Retainage Percent (used for applying retainage percentage on ALL commitment items)
- Under "Add New Commitment Item," click [Please Select a Line Item](#) and select 01.01.39 (Division 13 - Special Construction)
- Enter the Amount
- Click the Add button
- Repeat steps 4 through 6 until all commitment items have been entered.
- When complete, click the Submit button to move the process forward.

*Retainage Note: To set a retainage percent across all commitment items, enter the amount in the \*Retainage Percent box in the Commitment Others section. Otherwise, individual retainage may be set on individual commitment item(s).*

**Commitment Details**

Status: Draft

\* Commitment Type:

\* Commitment Control: Controlled By Commitment Item

\* Company:

Contact:

Unit Cost Options: Lump Sum Amount

Company Number:

**Commitment Others**

Commitment Date:

Scope of work:

\* Retainage Percent:

Notice to Proceed Date:

## AD/Acct/Dir Review:

1. Click process name to open Commitment Approval.

Processes **Reports (1)** Print Log

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status
CA - 7								

3. Scroll to review and complete the necessary details. Required fields will have a red asterisk (\*) and the process cannot be submitted until all required fields have been completed.

Object: 05 - Commitment Approval

Process Document: 05 - Commitment Approval

Current Workflow Step:  

Overall Due Date:  

Step Due Date:  

\* Subject:

Tracking Prefix:

Notes:

---

Approval of this commitment requires that all parties (*Director, Assistant/Associate Director, and Accounting*) approve of this commitment. If one party rejects this commitment (*taking the revise action*), the workflow will return to the initiator. A comment is required on revise actions.

---

Project ID:

Building Permit Number:

Date of Proposal:

Scope of Work:

SFM Permit Number:

Project Manager:

Project Manager e-Mail:

---

**Commitment Details**

Status:

Commitment Type:

Commitment Control:

Company:

Contact:

Checked:

Link Cost Options:

Company Number:

---

**Commitment Others**

Commitment Date:

Scope of Work:

\* Retainage Percent:

Notice to Proceed Date:

---

**Commitment Custom Fields**

PeopleSoft PO Number:

---

**Commitment Items**

There are no commitment items.

3. Select an action and click **Take Action** button to move process along; possible actions are:
  - a. **Approve to AVP** – Select this action if all information is correct and process is ready to move forward.
  - b. **Revise to Initiator** – Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

e-Builder Like | ?

05 - Commitment Approval (CA) - 7

Delete Instance
Workflow Override
All Fields View
Instructions

... Please select an action ...
Take Action
Check Spelling
Print
Copy
Delegate
Save
Cancel

## Initiator Revise:

1. Click process name to open Commitment Approval.

Processes Reports (1) Print Log

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status
CA - 7								

2. Review comments by selecting the **Comments** tab.

Details Comments (1) Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

Private  Comment

Make Private These are the comments

Request Comment Comment

3. Scroll and complete the necessary details. Required fields will have a red asterisk (\*) and the process cannot be submitted until all required fields have been completed.

Entering Commitment Item Instructions:

1. Select the Commitment Type
2. Select the Company
3. Optional: set the Commitment Date, Scope of work, Notice to Proceed Date, and Retainage Percent (used for applying retainage percentage on **ALL** commitment items)
4. Under "Add New Commitment Item," click Please Select a Line Item and select 01.01.39 (Division 13 - Special Construction)
5. Enter the Amount
6. Click the Add button
7. Repeat steps 4 through 6 until all commitment items have been entered.
8. When complete, click the Submit button to move the process forward.

*Retainage Note: To set a retainage percent across all commitment items, enter the amount in the \*Retainage Percent box in the Commitment Others section. Otherwise, individual retainage may be set on individual commitment item(s).*

---

**Commitment Details**

Status: Draft

\* Commitment Type:

\* Commitment Control: Controlled By Commitment Item

\* Company:

Contact:

Unit Cost Options: Lump Sum Amount

Company Number:

---

**Commitment Others**

Commitment Date:

Scope of work:

\* Retainage Percent:

Notice to Proceed Date:

4. Select an action and click **Take Action** button to move process along; possible actions to take are:

- Resubmit** – Take this action once all comments have been addressed and all information in the process has been updated accordingly.
- Void** – Process is no longer needed and routes to finish in a Void status.

e-Builder Like ?

05 - Commitment Approval (CA) - 7 Delete Instance Workflow Override All Fields View Instructions

Take Action Check Spelling Print Copy Delegate Save Cancel

## AVP Review:

1. Click process name to open Commitment Approval.

Processes Reports (1) Print Log

Process	Subject	Step	Responsible Actors	Step Age	In Step Since	Date Created	Process Age	Status
CA - 7								

2. Review the following information:

Project: Process Document: 05 - Commitment Approval Current Workflow Step: * Subject: <input type="text"/> Tracking Prefix: <input type="text"/> Status:	Overall Due Date: Step Due Date:
Project ID: Building Permit Number: Date of Proposal: Scope of Work: <input type="text"/> SPM Permit Number: Project Manager: Project Manager e-Mail:	
<b>Commitment Details</b>	
Status: * Commitment Type: * Commitment Control: * Company: Contact: Created:	Unit Cost Options: Company Number:
<b>Commitment Others</b>	
Commitment Date: Scope of work: * Retainage Percent:	Notice to Proceed Date:
<b>Commitment Custom Fields</b>	
PeopleSoft PO Number: <input type="text"/>	
<b>Commitment Items</b>	
There are no commitment items	

3. Select an action and click **Take Action** button to move process along; possible actions are:

- Approve Commitment**– Select this action if all information is entered and process is ready to move forward.
- Revise to Initiator** - Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

e-Builder Like ?  
 05 - Commitment Approval (CA) - 7 Delete Instance Workflow Override All Fields View Instructions  
 -- Please select an action -- **Take Action** Check Spelling Print Copy Delegate Save Cancel



## Contract Specialist Review:

1. Click process name to open Commitment Approval.

Process	Subject	Step	Responsible Actor	Step Age	In Step Since	Date Created	Process Age	Status
CA - 7								

2. Review the information, use Cobblestone (DocuSign) to get signatures, and upload the signed contract. Required fields will have a red asterisk (\*) and the process cannot be submitted until all required fields have

Please upload the signed contract from Cobblestone in to the Executed Contract field.

Project ID:

Building Permit Number:

Date of Proposal:

Scope of Work:

SFM Permit Number:

Project Manager:

Project Manager e-Mail:

\* Executed Contract:  or

3. Select an action and click **Take Action** button to move process along; possible actions are:
  - a. **Commitment Ready** – Select this action if all information is entered and process is ready to move forward.

05 - Commitment Approval (CA) - 7

## Accounting Review:

1. Click process name to open Commitment Approval.

Process	Subject	Step	Responsible Actor	Step Age	In Step Since	Date Created	Process Age	Status
CA-7								

2. Review to ensure that the budget is sufficient (increase if necessary) and validate the information in PeopleSoft. Required fields will have a red asterisk (\*) and the process cannot be submitted until all required fields have been completed.

Please enter the PeopleSoft PO Number in the designated Commitment Custom Fields below.

\* Click YES to confirm PeopleSoft PO Number was entered:  Yes

**Commitment Details**

Status: Draft

\* Commitment Type:

\* Commitment Control: Controlled By Commitment Item

\* Company:

Contact:

Unit Cost Options: Lump Sum Amount

Company Number:

**Commitment Others**

Commitment Date:

Scope of work:

Notice to Proceed Date:

\* Retainage Percent:

**Commitment Custom Fields**

PeopleSoft PO Number:

3. Select an action and click **Take Action** button to move process along; possible actions are:
  - a. **Funds Validated** – Select this action if all information is entered and process is ready to move forward.
  - b. **Revise to Initiator** - Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

05 - Commitment Approval (CA) - 7

-- Please select an action -- ▾

<p>Project: <b>1</b> ! Training Project *****</p> <p>Process Document: <b>2</b> CO - 1  <a href="#">Show History</a>   <a href="#">Current Actors</a></p> <p>Current Workflow Step: <b>3</b> Procurement Review C <a href="#">Show Workflow Diagram</a></p> <p>Subject: <b>4</b> CO Initiated on 9/22/2016 6:57:35 PM</p> <p>Status: <b>5</b> Submitted</p>	<p>Project Number: <b>6</b> 1111111111</p> <p>Overall Due Date: <b>7</b></p> <p>Step Due Date: <b>8</b></p>
---	---

## Process Description:

Each time you open a process to perform your function within a project, you will see the Process Header. The process header contains information that can help you identify where you are within a process, within a project.

1. **Project:** Project Name
2. **Process Document:** The process instance
  - [Show History](#): Will display a historical list of actions taken within this process instance
  - [Current Actors](#): Will display a list of actors responsible for the process in its current step
3. **Current Workflow Step:** The name of the current step
  - [Show Workflow Diagram](#): Will display the workflow diagram, highlighting the current step where this instance is with a blue frame
4. **Subject:** Displays the specific process instance subject
5. **Status:** Displays the process' current status
6. **Project Number:** Displays the project number
7. **Overall Due Date:** Date the process needs to be completed by *(If applicable)*
8. **Step Due Date:** Date this step in the process needs to be completed by *(If applicable)*

**Support:**

**Announcements** ▾

**To contact e-Builder Support**  
Please call (888) 288-5717 or email [support@e-builder.net](mailto:support@e-builder.net). Thank you!

**Notes and Comments:**